ICI Release Notes

Release 8.2 (Patch 1)

November 2022

Icertis

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ICI Release 8.2 (Patch 1)

Introduction

The Icertis Contract Intelligence 8.2 Release (Patch 1) offers some new platform features and some bug fixes.

New Features

Folder Structure for organizing agreement related documents

What: With this release, ICI now supports:

- Configuring the Folder Path attribute for associated documents.

- Categorizing documents from Associated Document contract type under different folders.

- Accessing all documents categorized in the configured structure in a file explorer, from the Document List tab on the agreement Details page.

- Downloading and viewing document details from the folder view.

- Easy drag and drop functionality to move documents within folders.

- Assigning folders when creating associated documents.

- Searching based on the file name, associated document name within the folder structure.

- Enable folder & sub-folder view in the Outlook Add-In (drag and drop associations list)

Advantage: Helps structuring and organizing different types of documents.

How: Administrators can configure the folder structure for each agreement contract type using backend scripts.

Value: Cost Saving | Time Saving | Ease of Use
For: Administrators

Feature ID: 1471136, 1299162

File Upload Support for Bulk Association Contract Type

What: With this release, ICI now supports:

- Enable the upload files to Associated Document contract type that has the Enable Bulk Processing option enabled.

- Users can upload files to the associated document contract type.

- Support for capturing emails and documents as associations in Outlook Add-in

Advantage: Large number of files can now be uploaded in bulk directly to the associated document contract type. For example, uploading more than 1000 line items to an RFQ.

How: Administrators can now enable or disable document upload option when the **Enable Bulk Processing** option is enabled.

Value: Cost Saving | Time Saving | Ease of Use
For: Administrators
Feature ID: 1471141, 1299160

Access API Hub from ICI Platform

What: Option to access the Icertis API Hub built on Azure APIM framework from the ICI platform.

The developer can directly reach to the API Hub from the ICI platform instead of navigating and logging in to the API Hub separately. The developer will not need a separate login step to access the API Hub.

Advantages:

- Eliminates the need to keep a track of another application to login

- Facilitates a single-step access to the Icertis API Hub

How: Using the access link provided under the Configure menu in ICI, as shown in the image below.

Note:

- Ensure the API Management Service is enabled for the instance

- Developer should be an internal user and logged in to the ICI platform.

- Developer accessing the API hub should be assigned the "APIM Dev Portal User" role.

Value: User Experience | Ease of Use | Improved Efficiency
For: API Developer
Feature ID: 1496090

Bugs Fixed

The following bugs have been fixed with this patch (8.2.1.0):

Bug ID	Description
1479171	*On updating "Default Search Columns" with an Admin user, they were not getting displayed in search, for some created users.
1506148	*On creating a Sell Side Request using Salesforce, the initial Payment due date and Termination dates displayed in ICI were incorrect.
1515657	*The widget search was not working as expected for some of the ICI entities.
1529516	On running Discover AI and publishing a contract, the attributes were not being tagged at the correct place in the word document.
1533027	On creating an agreement, electronic signature was not working as expected for some users.
1540300	When creating an association, some of the choice attributes and association tool tips were not being displayed correctly.
1542796	When logged on as a service user, the Search API was not working as expected.
1543935	URL attributes were not being displayed correctly on the agreement index page.
1545662	On deleting a rule, the copy rule functionality was not working as expected.
1546147	ICI was not working as expected when using Safari browser version 15.7 with iPhone.
1549040	On adding a new user to an agreement, the user role was not being displayed in the notification subject line.
1549486	Users were unable to send the executed copy of the agreement to Coupa.
1551761	Creating a Workday contract in ICI was resulting in an error.
1556219	The attributes on the Create Request page were not being displayed in the expected format.

Updates

- Salesforce version 3.23.1 is released with this patch.

- Sourcing App is released with label version Src8.2.1.0.

- Obligation Management App is released with label version OM8.2.1.0.

- Proposal Management App is released with label version PM8.2.1.0.

- Risk Management App is released with label version RM8.2.1.0.

- Supplier Onboarding & Diversity Compliance App is released with version SRM8.2.1.0.

- Rebates & Promotions App is released with version Rebate8.2.1.0.

- Matter Management App is released with version MMApp8.2.1.0.